LAS VEGAS VISITOR PROFILE

Calendar Year 2015

Downtown/Strip Corridor Version (Location of Lodging)

San Francisco, CA 94105

116 New Montgomery Street

Research that works.

Telephone: (415) 974-6620 Facsimile: (415) 947-0260

www.glsresearch.com

San Francisco Las Vegas

Prepared for:

Las Vegas Convention and Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

The Las Vegas Convention and Visitors Authority and GLS Research extend thanks to the Las Vegas community for their cooperation on this research project. Special appreciation is noted for cooperation and assistance received from the hotel, motel, and casino industry. Appreciation is also extended to the interviewers and Las Vegas visitors without whose dedicated cooperation this study could not have been completed.

VISITOR PROFILE STUDY

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Senior Vice President of Marketing – Cathy Tull

RESEARCH CENTER
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EXECUTIVE SUMMARY

The Las Vegas Visitor Profile Study is conducted monthly and reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time. This report presents the findings from the 3,600 personal interviews conducted by GLS Research throughout calendar year 2015.

Visitors who lodged Downtown and visitors who lodged in the Strip Corridor are the focus of this report. The tables and charts in this report show data for all visitors and for three visitor subgroups:

- <u>DOWNTOWN</u> visitors who lodged Downtown during their visit 5% of all visitors.
- **STRIP CORRIDOR*** visitors who lodged on or just off the Strip 76% of all visitors.
- <u>OTHER</u> the remaining visitors (those who lodged in locations other than Downtown or the Strip Corridor or those on a day trip to Las Vegas — 19%).

This section presents the research highlights. The findings are presented in detail beginning on page 7.

^{*} The Strip Corridor includes properties located directly on Las Vegas Boulevard South and between Valley View Road and Paradise Road.

DOWNTOWN LODGERS

Visitors who lodged Downtown were more likely than those who lodged on the Strip Corridor to:

- Have visited Las Vegas before (88%) and to have visited Las Vegas the most frequently in the past 12 months (average of 2.0 visits).
- Be visiting Las Vegas primarily to gamble (27%).
- Have taken ground transportation to Las Vegas (66%).
- Have lodged in a hotel (99%).
- Have booked their accommodations by calling the property directly (43%).
- Have booked their accommodations seven to 30 days in advance (75%).
- Have gambled during their visit (87%) and gambled more hours per day (average of 4.6 hours).
- Be older (mean age of 50.7) and retired (34%).
- Be from the United States (96%), particularly from the West (71%) and Southern California (42%).

During their visit to Las Vegas Downtown lodgers spent an average of:

- \$194.85 on food and drink.
- \$79.78 on shopping.
- \$52.84 on shows and entertainment.

STRIP CORRIDOR LODGERS

Visitors who lodged on the Strip Corridor were more likely than those who lodged Downtown to:

- Be making their first visit to Las Vegas (19%).
- Say the purpose of their current visit was to attend a convention, trade show, or corporate meeting (11%).
- Have traveled to Las Vegas by air (49%).
- Have taken a taxi (34%) or rode the Monorail (13%) during their visit.
- Have planned their trip more than one month in advance (56%).
- Have used the Internet to plan their trip (67%).
- Have used the Internet to book their transportation (52%).
- Have booked their accommodations through a third party website (37%).
- Have children under the age of 21 in their party (7%).
- Have seen a Broadway/production show during their visit (46%) and been to other Las Vegas attractions for which you have to pay (23%).
- Be employed (68%).
- Be visiting from a foreign country (19%).

During their visit to Las Vegas Strip Corridor lodgers spent an average of:

- \$331.63 on food and drink.
- \$143.03 on shopping.
- \$71.19 on shows and entertainment.

INTRODUCTION

The Las Vegas Visitor Profile Study is conducted monthly, and reported annually, to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time.

More specifically, the Las Vegas Visitor Profile aims:

- To provide a profile of Las Vegas visitors in terms of sociodemographic and behavioral characteristics.
- To monitor trends in visitor behavior and visitor characteristics.
- To supply detailed information on the vacation and gaming habits of different visitor groups, particularly gaming and non-gaming expenditures.
- To allow the identification of market segments and potential target markets.
- To provide a basis for calculating the economic impact of different visitor groups.
- To determine visitor satisfaction levels.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2015. These questions will be rotated back into the questionnaire in Calendar Year 2016 and subsequently asked every other year.

METHODOLOGY

In-person interviews were conducted with 3,600 randomly selected visitors. Three-hundred (300) interviews were conducted each month for 12 months from January through December 2015. Qualified survey respondents were visitors to Las Vegas (excluding residents of Clark County, Nevada) who were at least 21 years of age. In addition, only visitors who planned to leave Las Vegas within 24 hours were asked to complete the survey.

The results of the Las Vegas Visitor Profile have been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode of transportation, lodging location, and month of visit. Specifically, the mode of transportation weight is derived from a compilation of data provided by the LVCVA, McCarran International Airport, and the Nevada Department of Transportation. The lodging location weight is derived from geographic area specific occupancy rates from independent surveys conducted by the LVCVA. The month of visit weight is derived from monthly room nights occupied data, also from independent surveys conducted by the LVCVA as part of their ongoing room occupancy audit.

Visitors were intercepted in the vicinity of Las Vegas casinos, hotels, motels, and RV parks. To assure a random selection of visitors, different locations were utilized on each interviewing day, and interviewing was conducted at different times of the day. Upon completion of the interview, visitors were given souvenirs as "thank you's". Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

Beginning with the 2012 Visitor Profile, apparent shifts in certain results may partially be attributed to subtle changes in the sampling methodology. Enhancing the current methodology allowed for an updated mix of survey locations with new outdoor sites added to the current indoor locations at area hotels and motels. Additionally, the age range of surveyors was broadened to help achieve as representative a sample as possible. Looking ahead, continued monitoring of the survey collection processes will identify any shifts with the data and determine if they are a result of methodological changes or reflective of actual changes in the visitor characteristics.

Interviews were edited for completeness and accuracy, and entered into a computerized database for analysis. The information was then analyzed using statistical software packages available to GLS Research.

Throughout this report, bar charts are used to illustrate the data. The data presented in these charts are based on the total sample of respondents for 2015, unless otherwise specified. In charts using proportions, those proportions may

not add to 100% because of rounding or because multiple responses were permitted.

When we note that a difference between subgroups on a particular measure is "significant" or "statistically significant," we mean that there is a 95% or better chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is "not significant" or "not statistically significant," we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

Visitors who lodged Downtown and visitors who lodged in the Strip Corridor are the focus of this report. Statistically significant differences in the behavior, attitudes, and opinions by lodging location are pointed out in the text of the report.

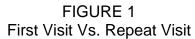
In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 2015. These questions will be rotated back into the questionnaire in Calendar Year 2016 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

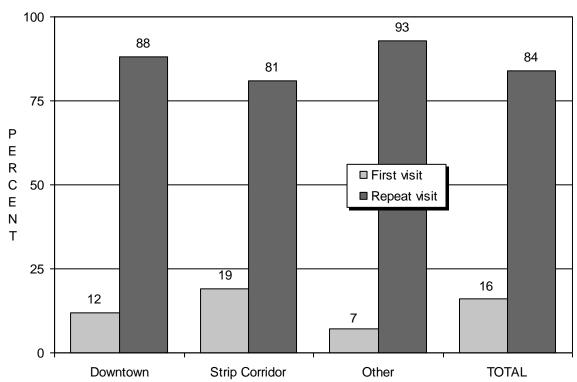
Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

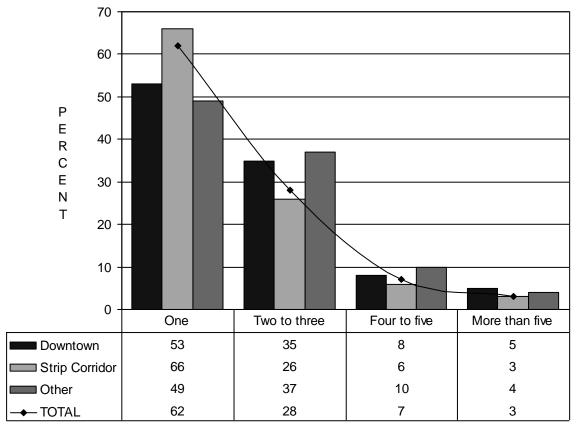
REASONS FOR VISITING

Most visitors (84%) said they have visited Las Vegas in the past. Strip Corridor lodgers (19%) were significantly more likely to be first-time visitors to Las Vegas than those lodging Downtown (12%) or lodging in areas other than the Strip or Downtown (7%).





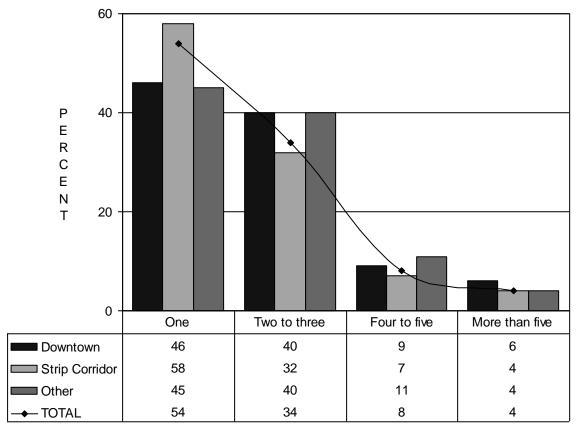




(Means: Downtown=2.0, Strip Corridor=1.7, Other=2.1, TOTAL=1.8)

Among all visitors, the average number of visits to Las Vegas in the past year was 1.8. Strip Corridor lodgers visited less frequently during the past year (1.7 visits) compared to Downtown lodgers (2.0 visits) and those lodging outside of the Strip or Downtown (2.1 visits).

FIGURE 3
Frequency Of Visits In Past Year
(Among Repeat Visitors)



(Base Sizes: Downtown=163, Strip Corridor=2213, Other=649, TOTAL=3024) (Means: Downtown=2.1; Strip Corridor=1.9, Other=2.1, TOTAL=1.9)

Among repeat visitors, the average number of visits to Las Vegas in the past year was 1.9. Again, Strip Corridor lodgers (1.9 visits) visited less frequently in the past year than Downtown lodgers and those lodging outside of the Strip or Downtown (2.1 visits each).

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Las Vegas Visitor Profile

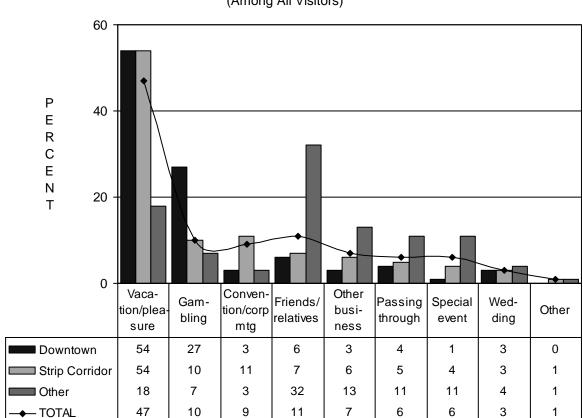
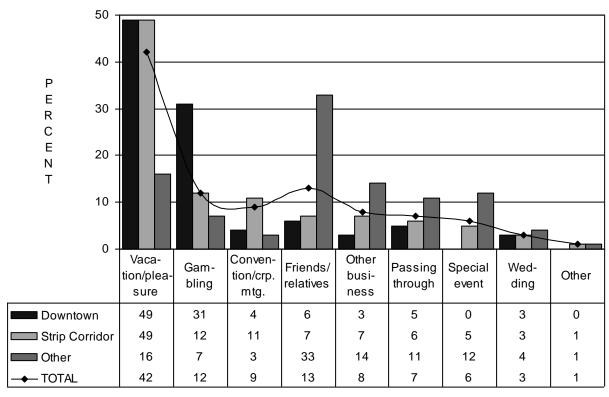


FIGURE 4 Primary Purpose Of Current Visit (Among All Visitors)

When asked about the primary purpose of their current visit to Las Vegas, Downtown and Strip Corridor lodgers (54% each) were significantly more likely to mention vacation or pleasure than those who lodged elsewhere (18%). Other lodgers were more likely to be visiting Las Vegas to see friends or relatives (32% vs. 7% for Strip Corridor lodgers and 6% for Downtown lodgers), for business purposes other than a convention or corporate meeting (13% vs. 6% for Strip Corridor lodgers and 3% for Downtown lodgers) or were just passing through (11%, compared to 5% for Strip Corridor lodgers and 4% for Downtown lodgers). Other lodgers (11%) were also more likely than Downtown lodgers (4%), who in turn were more likely than Strip Corridor lodgers (1%), to be visiting Las Vegas for a special event. Downtown lodgers (27%) were much more likely than Strip Corridor lodgers (10%) to say they were visiting Las Vegas primarily to gamble, while those lodging elsewhere (7%) were the least likely. Strip Corridor lodgers (11%) were more likely to be visiting Las Vegas for a convention or corporate meeting than Downtown lodgers or those who lodged elsewhere (3% each).

FIGURE 5
Primary Purpose Of Current Visit
(Among Repeat Visitors)

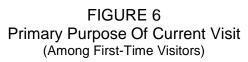


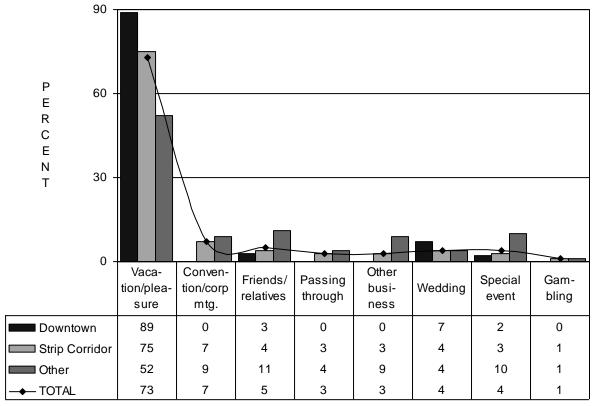
(Base Sizes: Downtown=163, Strip Corridor=2213, Other=649, TOTAL=3024)

Looking at the primary purpose of their current visit to Las Vegas among repeat visitors, Downtown and Strip Corridor lodgers (49% each) were significantly more likely to mention vacation or pleasure than those who lodged elsewhere (16%). Other lodgers were more likely to be visiting Las Vegas to see friends or relatives (33% vs. 7% for Strip Corridor lodgers and 6% for Downtown lodgers), for business purposes other than a convention or corporate meeting (14% vs. 7% for Strip Corridor lodgers and 3% for Downtown lodgers) or were just passing through (11%, compared to 6% for Strip Corridor lodgers and 5% for Downtown lodgers). Other lodgers (12%) were also more likely than Strip Corridor lodgers (5%), who in turn were more likely than Downtown lodgers (less than 1%), to be visiting Las Vegas for a special event. Downtown lodgers (31%) were significantly more likely than Strip Corridor lodgers (12%) to say they were visiting Las Vegas primarily to gamble, while those lodging elsewhere (7%) were the least likely. Strip Corridor lodgers (11%) were significantly more likely to be visiting Las Vegas for a convention or corporate meeting than Downtown lodgers (4%) or those who lodged elsewhere (3%).

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Las Vegas Visitor Profile

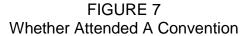


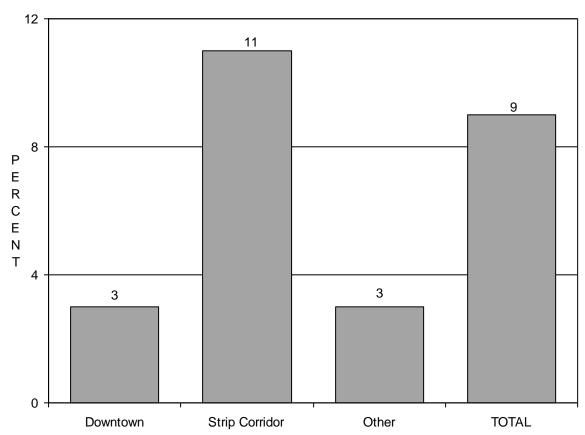


(Base Sizes: Downtown=22*, Strip Corridor=504, Other=51, TOTAL=577)

Among first time visitors, Downtown* (89%) and Strip Corridor lodgers (75%) were more likely than those lodging elsewhere (52%) to be visiting primarily for vacation or pleasure.

Note very small base size for Downtown lodgers.





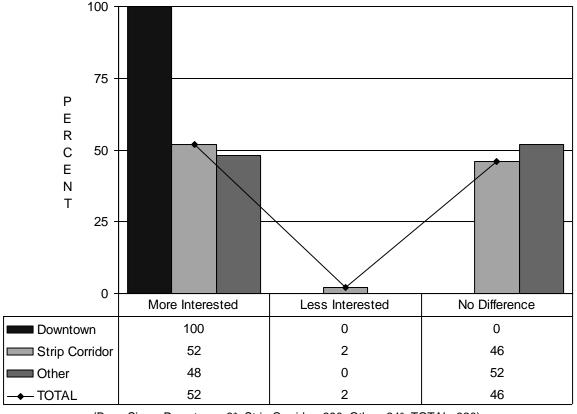
Only "yes" responses are reported in this figure.

Respondents were asked if they participated in or attended a convention, trade show or corporate meeting while they were in Las Vegas. Strip Corridor lodgers (11%) were more likely to have done so than Downtown or other lodgers.

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Las Vegas Visitor Profile

FIGURE 8 Interest In Attending Conventions, Trade Shows, Or Corporate Meetings In Las Vegas (Among Visitors Who Attended A Convention, Trade Show, Or Corporate Meeting)

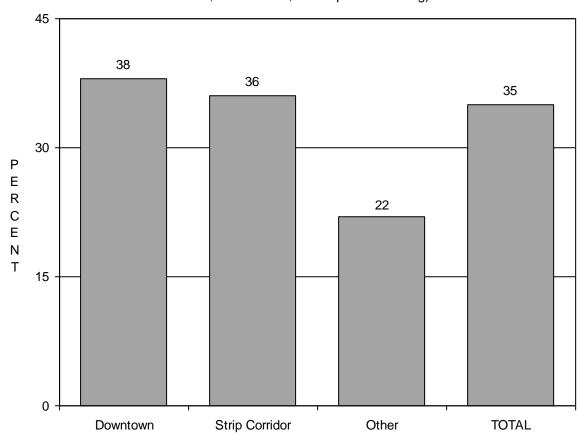


(Base Sizes: Downtown=6*, Strip Corridor=290, Other=24*, TOTAL=320)

Convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention, or if it made no difference. In 2015, 52% said having the convention in Las Vegas made them more interested in attending, while 46% said it made no difference. Only 2% said holding a convention in Las Vegas made them less interested in attending. There were no major differences among the subgroups on this measure.

Note the extremely small base sizes for Downtown and Other lodgers.

FIGURE 9
Whether Brought Someone Else Who Did Not Attend
Conventions, Trade Shows, Or Corporate Meetings In Las Vegas
(Among Visitors Who Attended A
Convention, Trade Show, Or Corporate Meeting)



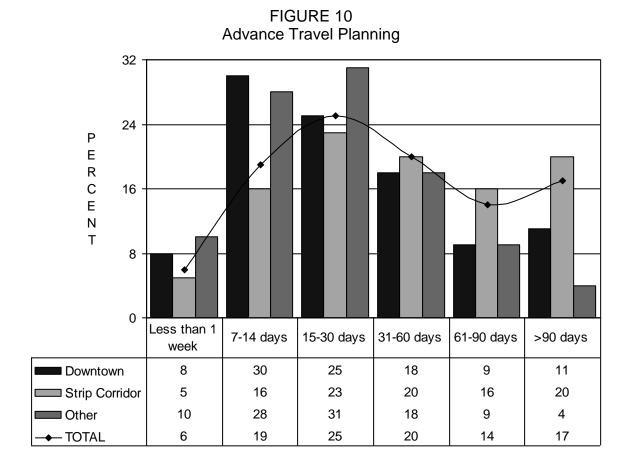
Only "yes" responses are reported in this figure. (Base Sizes: Downtown=6*, Strip Corridor=290, Other=24*, TOTAL=320)

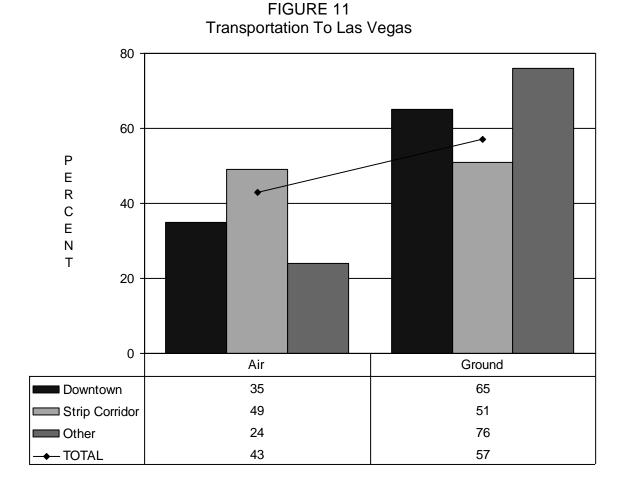
Convention visitors were asked if they had brought a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting with them. Thirty-five percent (35%) of these respondents said they had. There were no noteworthy differences among the subgroups on this question.

Note the extremely small base sizes for Downtown and Other lodgers.

TRAVEL PLANNING

Just over one-half (51%) of visitors in 2015 planned their trip to Las Vegas more than one month in advance. Strip Corridor lodgers (56%) were much more likely than Downtown lodgers (38%) and those lodging elsewhere (31%) to have planned their trips more than 30 days in advance. Nearly seven in ten (69%) of those lodging somewhere other than Downtown or the Strip Corridor, and more than six in ten (63%) Downtown lodgers, planned their trips one month or less in advance, compared to 44% of Strip Corridor lodgers.





Strip Corridor lodgers (49%) were more likely than Downtown lodgers (35%), who in turn were more likely than other lodgers (24%), to have traveled to Las Vegas by air. Conversely, those lodging elsewhere (76%) were more likely than Downtown lodgers (65%), who in turn were more likely than Strip Corridor lodgers (51%), to have used ground transportation to travel to Las Vegas.

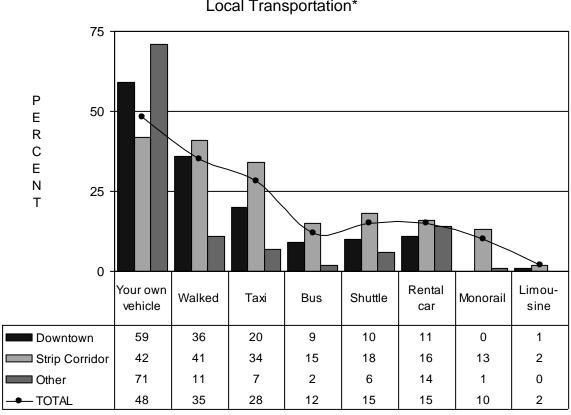
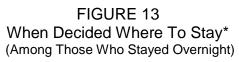
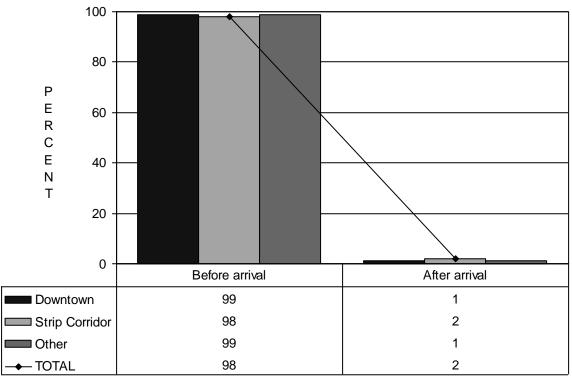


FIGURE 12 Local Transportation*

*Multiple responses permitted

Visitors were asked about the types of local transportation they had used while on their current visit to Las Vegas. Visitors who lodged somewhere other than Downtown or the Strip Corridor (71%) were more likely than those lodging Downtown (59%), who in turn were more likely than Strip Corridor lodgers (42%), to say they used their own vehicle to get around Las Vegas. Strip Corridor (41%) and Downtown lodgers (36%) were both more likely than those lodging elsewhere (11%) to say that they walked around Las Vegas. Strip Corridor lodgers (34%) were more likely than Downtown lodgers (20%), who were in turn more likely than other lodgers (7%), to have used a taxi. Strip Corridor lodgers (15%) were also more likely than Downtown lodgers (9%), who were in turn more likely than other lodgers (2%), to have used a bus while in Las Vegas. Strip Corridor lodgers (18%) were the most likely to have used a hotel/motel shuttle (compared to 10% of Downtown lodgers and 6% of those who lodged elsewhere) or the Monorail (13% vs. less than 1% of Downtown lodgers and 1% of those lodging elsewhere).





(Base Sizes: Downtown=187, Strip Corridor=2741, Other=658, TOTAL=3586)

Most visitors (98%) decided where to stay before leaving home. There were no major differences among the three subgroups on this measure.

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

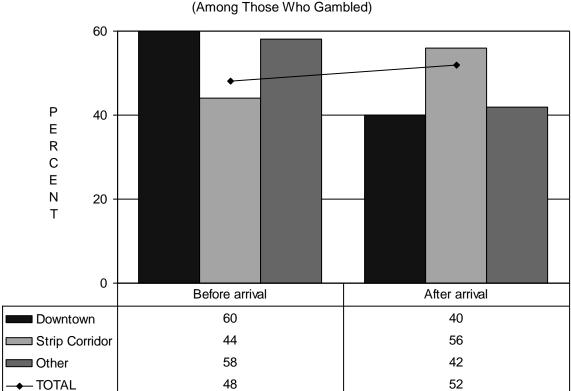


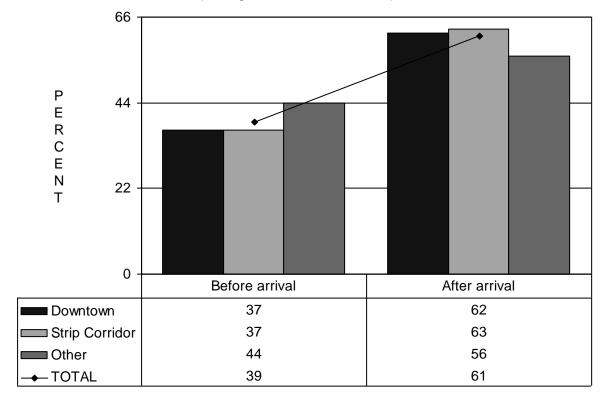
FIGURE 14
When Decided Where To Gamble*
(Among Those Who Gambled)

(Base Sizes: Downtown=156, Strip Corridor=1984, Other=411, TOTAL=2551)

Just over one-half (52%) of visitors decided where to gamble after arriving in Las Vegas, while the remaining 48% said they decided before their arrival. Downtown lodgers (60%) and those lodging elsewhere than the Strip or Downtown (58%) were more likely than Strip Corridor lodgers (44%) to say they decided where to gamble before arriving in Las Vegas.

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

FIGURE 15
When Decided Which Shows To See*
(Among Those Who Saw Shows)

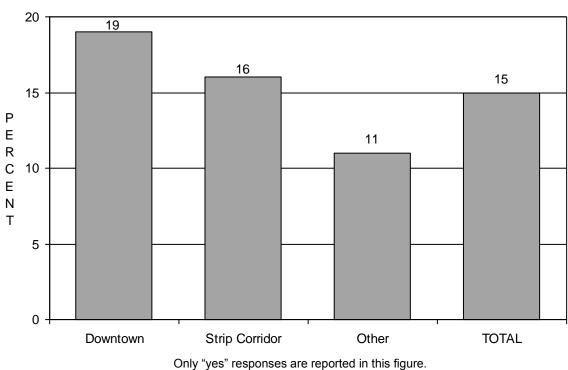


(Base Sizes: Downtown=118, Strip=1890, Other=340, TOTAL=2349)

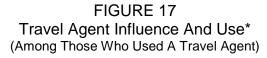
Six in ten visitors (61%) said they decided which shows to see after their arrival. Strip Corridor lodgers (63%) were significantly more likely than other non-Downtown lodgers (56%) to say they decided which shows to see after their arrival in Las Vegas.

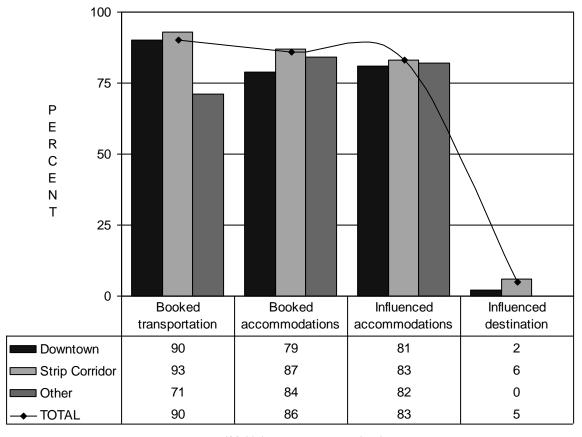
^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.





Overall, 15% of visitors reported using a travel agent to help them plan their most recent trip to Las Vegas. Downtown (19%) and Strip Corridor (16%) lodgers were more likely to have used a travel agent than other lodgers (11%).





*Multiple responses permitted (Base Sizes: Downtown=35, Strip Corridor=430, Other=77, TOTAL=542)

Among those visitors who used a travel agent, nine in ten (90%) said the travel agent helped book their transportation to Las Vegas and more than eight in ten (86%) said the travel agent helped book their accommodations in Las Vegas. More than eight in ten (83%) also said the travel agent influenced their choice of accommodations in Las Vegas. Strip Corridor (93%) and Downtown (90%) lodgers were significantly more likely than other lodgers (71%) to say the travel agent booked their transportation. Strip Corridor lodgers (6%) were the most likely to say the travel agent influenced their choice to visit Las Vegas.

0

Downtown

TOTAL

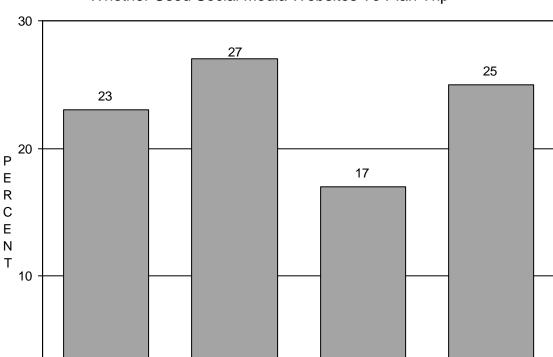


FIGURE 18 Whether Used Social Media Websites To Plan Trip

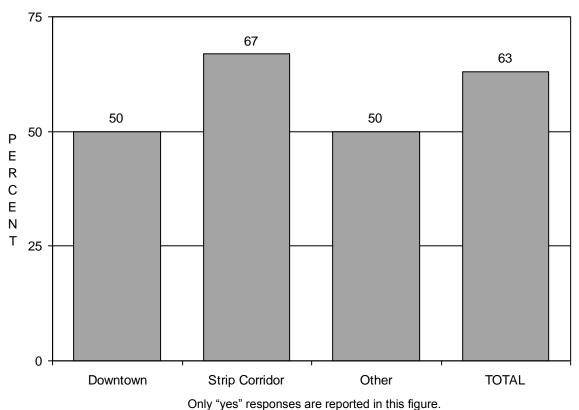
Only "yes" responses are reported in this figure.

Other

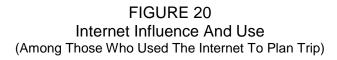
Visitors were asked if they used any social media websites, such as Facebook, or Twitter to help in planning their trip to Las Vegas. Twenty-five percent (25%) of all visitors said they had. Strip Corridor lodgers (27%) were more likely than other non-Downtown lodgers (17%) to have used social media websites to plan their trip.

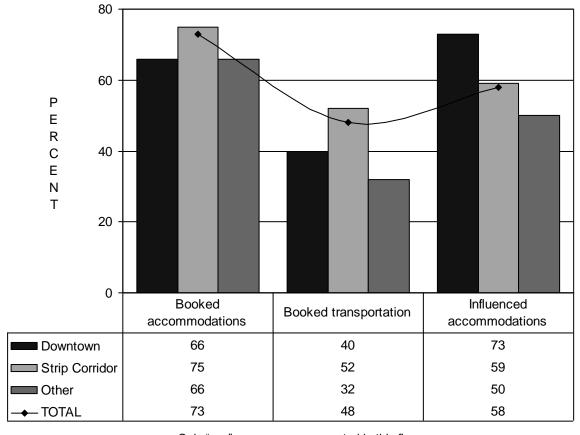
Strip Corridor

FIGURE 19 Whether Used The Internet To Plan Trip



Sixty-three percent (63%) of visitors said they used the Internet to plan their current trip to Las Vegas. Strip Corridor lodgers (67%) were significantly more likely than Downtown and other lodgers (50% each) to have used the Internet to plan their trip.

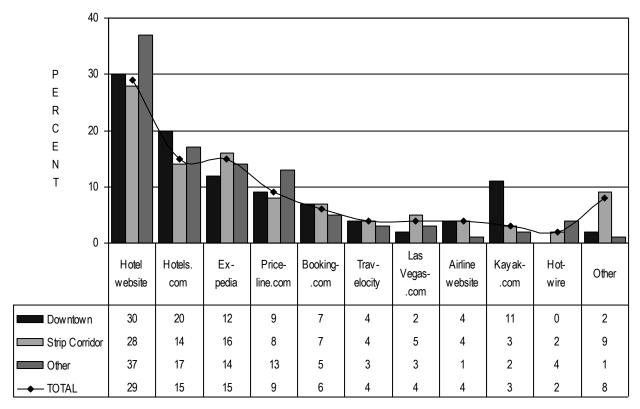




Only "yes" responses are reported in this figure. (Base Sizes: Downtown=93, Strip Corridor=1819, Other=348, TOTAL=2260)

Among those who used the Internet, Strip Corridor lodgers (52%) were more likely than Downtown (40%) and other lodgers (32%) to say they booked their transportation online. Strip Corridor lodgers (75%) were also the most likely to have booked their accommodations online, compared to 66% each of Downtown and other lodgers. Downtown lodgers (73%) were more likely than Strip Corridor lodgers (59%), who in turn were more likely than other lodgers (50%), to say that the Internet influenced their choice of accommodations.

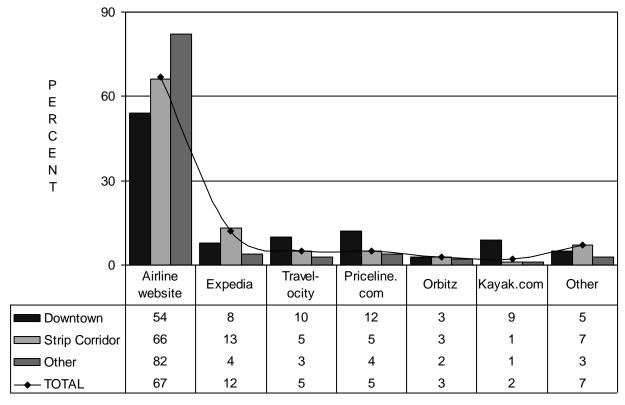
FIGURE 21
Website Used To Book Accommodations
(Among Those Who Used The Internet
To Book Their Accommodations In Las Vegas)



(Base Sizes: Downtown=62, Strip Corridor=1355, Other=230, TOTAL=1647)

Respondents who had used the Internet to book their accommodations in Las Vegas were asked to name the website they used. Twenty-nine percent (29%) said they used a hotel website to do so. Other non-Strip Corridor and non-Downtown lodgers (37%) were more likely than Strip Corridor lodgers (28%) to have used a hotel website. Downtown lodgers (11%) were more likely than Strip Corridor (3%) and other lodgers (2%) to have used Kayak.com.

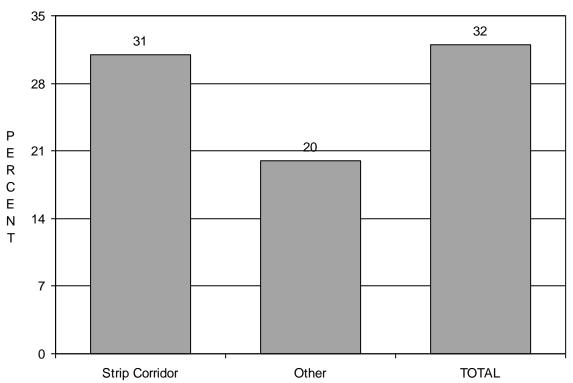
FIGURE 22
Website Used To Book Transportation
(Among Those Who Used The Internet
To Book Their Transportation To Las Vegas)



(Base Sizes: Downtown=37, Strip Corridor=947, Other=109, TOTAL=1093)

Respondents who had used the Internet to book their transportation to Las Vegas were also asked what website they used. Two-thirds (67%) said they used an airline website, while 12% said they used Expedia. Strip Corridor lodgers (66%) were significantly more likely than those lodging Downtown (54%) to have used an airline website, while those lodging elsewhere (82%) were the most likely to have done so. Strip Corridor lodgers (13%) were significantly more likely than other non-Downtown lodgers (4%) to have used Expedia.com. Downtown lodgers (9%) were the most likely to have used Kayak.com (compared to 1% each of Strip Corridor and other lodgers).





Only "yes" responses are reported in this figure.

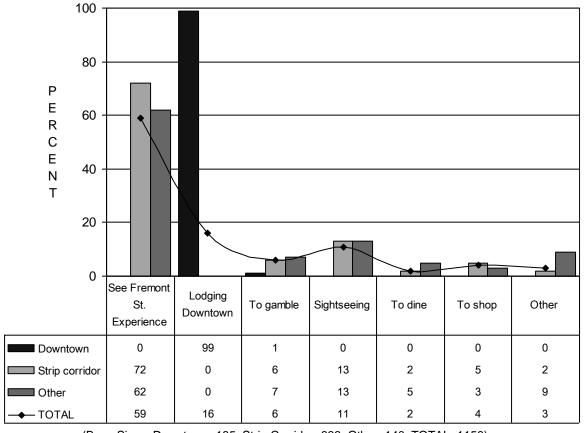
Thirty-two (32%) of all visitors said they visited Downtown Las Vegas on their current trip.** Strip Corridor lodgers (31%) were significantly more likely than other non-Downtown lodgers (20%) to have visited Downtown.

^{**} By definition, all (100%) respondents who said they lodged Downtown also visited the Downtown area on their current trip.

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Las Vegas Visitor Profile

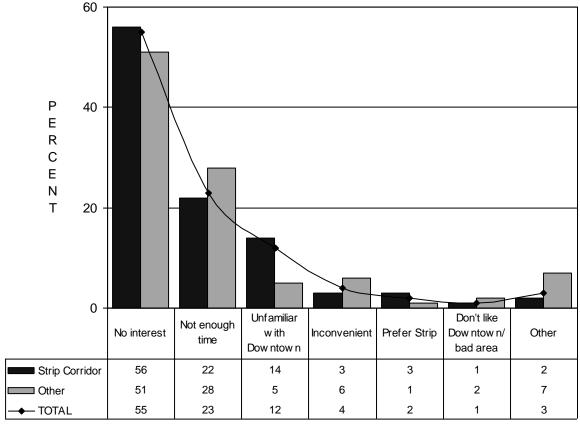




(Base Sizes: Downtown=185, Strip Corridor=833, Other=140, TOTAL=1158)

Visitors were asked for the primary reason they had gone to the Downtown area. Virtually all (99%) of those staying Downtown said they were there primarily because that was where they were lodging, while more than seven in ten (72%) Strip Corridor lodgers and more than six in ten (62%) other lodgers said they had gone Downtown primarily to see the Fremont Street Experience.

FIGURE 25
Why Did Not Visit Downtown Las Vegas*
(Among Those Who Did Not Visit Downtown)



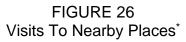
(Base Sizes: Strip Corridor=1831, Other=463, TOTAL=2295)

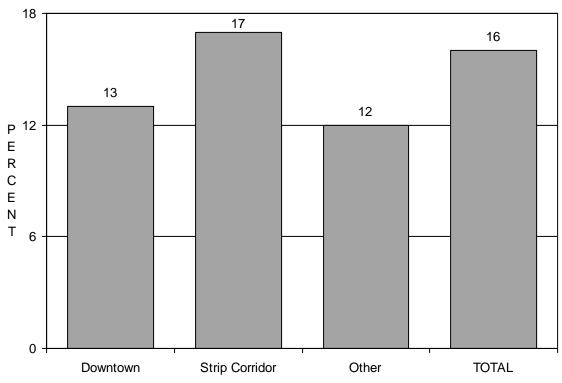
Visitors who did not travel Downtown were asked why they did not. More than one-half (55%) said it was because of a lack of interest in the Downtown area. Strip Corridor lodgers were more likely than other lodgers to say they were unfamiliar with the Downtown area (14% vs. 5%), while other lodgers were more likely than Strip Corridor lodgers to say the Downtown area was inconvenient or out of the way (6% vs. 3%).

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

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Las Vegas Visitor Profile

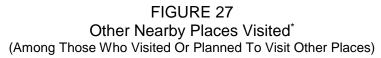


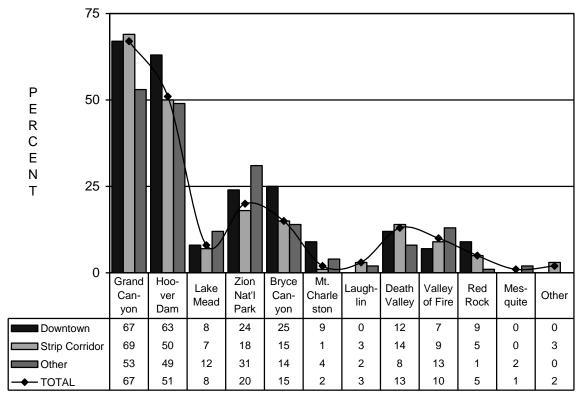


Only "yes" responses are reported in this figure.

Sixteen percent (16%) of visitors visited nearby places while on their current trip to Las Vegas. Strip Corridor lodgers (17%) were more likely than other non-Downtown lodgers (12%) to say they visited other nearby places.

These results are from 2014. This question is asked every other year and was not asked in 2015.





Multiple responses permitted.
(Base Sizes: Downtown=25[†], Strip Corridor=464, Other=77, TOTAL=566)

Among those who visited other places[†], Strip Corridor lodgers were significantly more likely than other non-Downtown lodgers to say they visited the Grand Canyon (69% vs. 53%). Other non-Downtown lodgers were more likely than Strip Corridor lodgers to say they visited Zion National Park (31% vs. 18%).

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

[†] Note the very small base size for Downtown lodgers

TRIP CHARACTERISTICS AND EXPENDITURES

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Las Vegas Visitor Profile

The majority of visitors (71%) traveled to Las Vegas in parties of two adults. Strip Corridor lodgers were more likely to be traveling in parties of four or more (12%) than Downtown (7%) and other lodgers (6%). Visitors who did not lodge Downtown or on the Strip Corridor were the most likely to be traveling alone (20% vs. 12% of Strip Corridor lodgers and 10% of Downtown lodgers). The average party size was higher for Strip Corridor lodgers (average of 2.3 adults) and Downtown lodgers (2.2) than for those who lodged elsewhere (2.0).

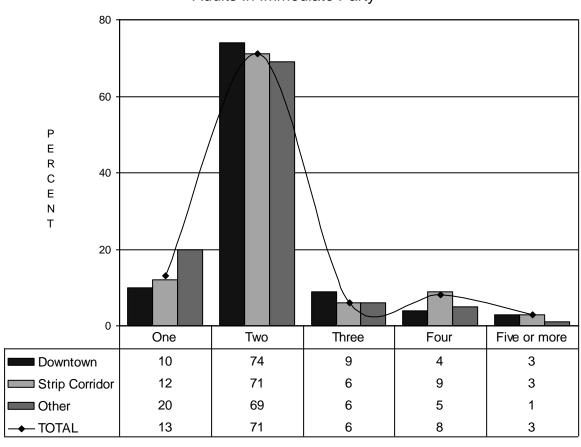
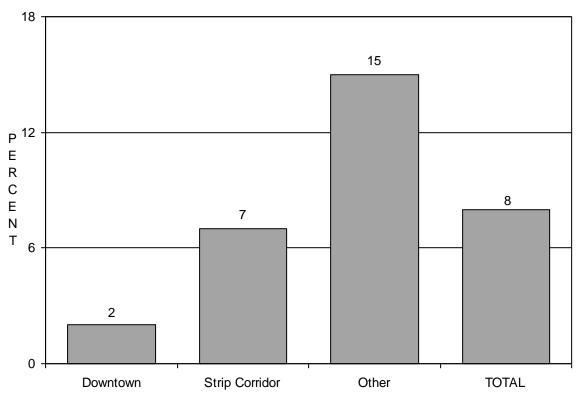


FIGURE 28 Adults In Immediate Party

(Means: Downtown=2.2, Strip Corridor=2.3, Other=2.0, TOTAL=2.2)

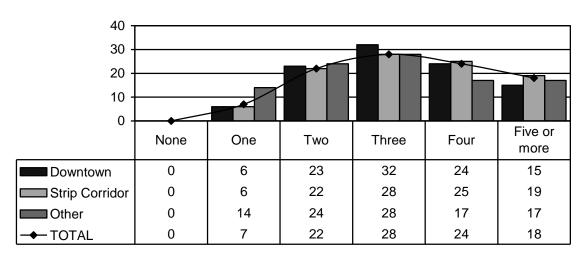
FIGURE 29
Whether Has Persons In Party Under Age 21
(Among All Visitors)



Only "yes" responses are reported in this figure.

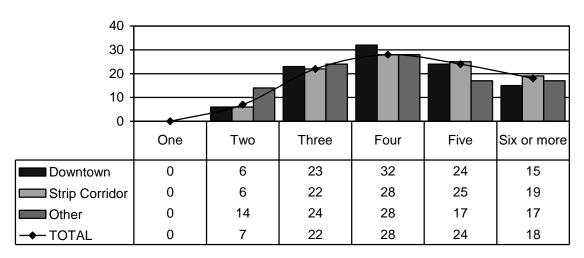
Eight percent (8%) of visitors said they were traveling with people under the age of 21 in their immediate party. Those visitors who lodged elsewhere than the Strip or Downtown (15%) were more likely than Strip Corridor lodgers (7%) to be traveling with people under the age of 21 in their immediate party, while Downtown lodgers (2%) were the least likely.

FIGURE 30 Nights Stayed



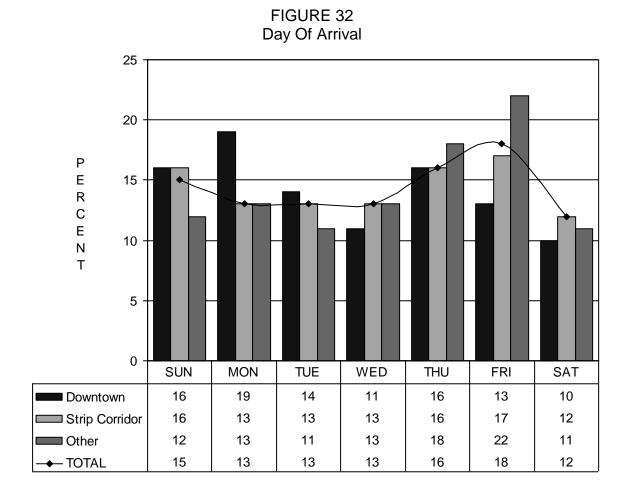
(Means: Downtown=3.3, Strip Corridor=3.4, Other=3.2, TOTAL=3.4)

FIGURE 31 Days Stayed

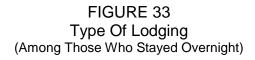


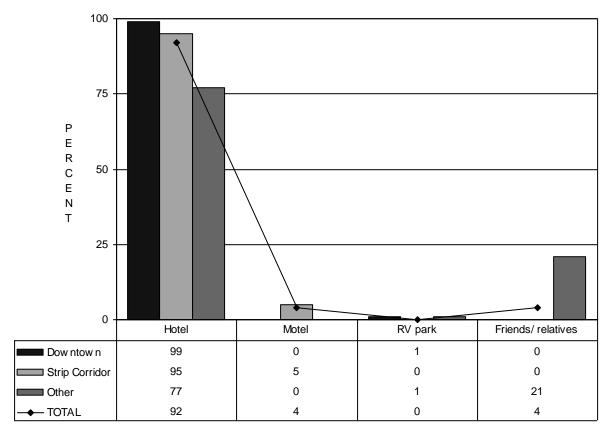
(Means: Downtown=4.3, Strip Corridor=4.4 Other=4.2, TOTAL=4.4)

Visitors stayed an average of 3.4 nights and 4.4 days in Las Vegas. Strip Corridor lodgers (3.4 nights and 4.4 days) stayed longer than other non-Downtown lodgers (3.2 nights and 4.2 days).



Visitors were most likely to arrive on a Friday (18%). Visitors who lodged somewhere other than Downtown or the Strip (22%) were the most likely to arrive on a Friday (compared to 17% of Strip Corridor lodgers and 13% of Downtown lodgers). Strip Corridor lodgers (16%) were more likely than other non-Downtown lodgers (12%) to arrive on a Sunday.





(Base Sizes: Downtown=185, Strip Corridor=2716, Other=699, TOTAL=3600)

Downtown lodgers (99%) were the most likely to have stayed in a hotel, while Strip Corridor lodgers (93%) were also significantly more likely to have done so than visitors lodging elsewhere (77%). Strip Corridor lodgers (5%) were also the most likely to have stayed in a motel.

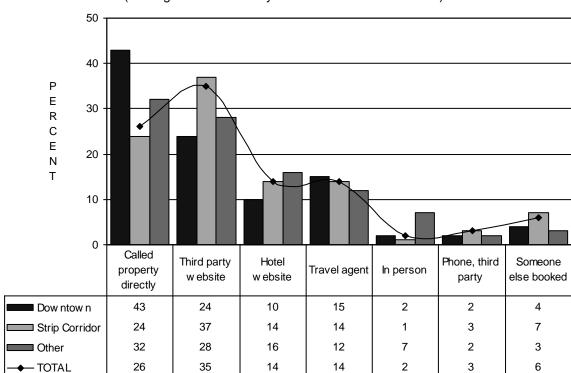


FIGURE 34
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/Motel/RV Park)

(Base Sizes: Downtown=185, Strip Corridor=2657, Other=525, TOTAL=3367)

Visitors who stayed at a hotel, motel, or in an RV park were asked how they or someone in their party booked their accommodations in Las Vegas for their most recent trip. Downtown lodgers (43%) were more likely than non-Strip Corridor other lodgers (32%) to say they called the property directly, while Strip Corridor lodgers (24%) were the least likely to book their accommodations this way. Strip Corridor lodgers (37%) were significantly more likely than Downtown (24%) and other lodgers (28%) to have used a third party website to book their accommodations. Downtown lodgers (10%) were less likely than Strip Corridor (14%) and other lodgers (16%) to have used a hotel website. Visitors who lodged somewhere other than the Strip Corridor or Downtown (7%) were the most likely to say they booked their accommodations in person (compared to 2% of Downtown lodgers and 1% of Strip Corridor lodgers).

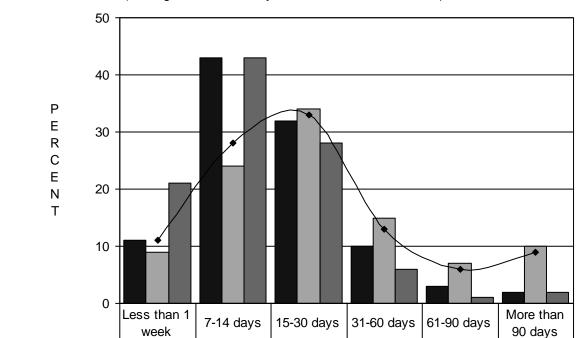


FIGURE 35
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)

(Base Sizes: Downtown=185, Strip Corridor=2657, Other=525, TOTAL=3367)

Downtown

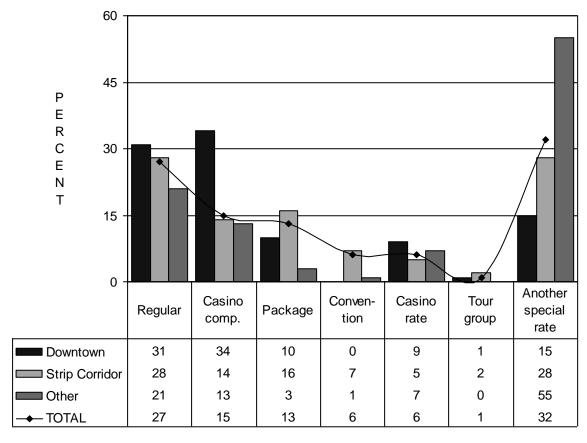
Strip Corridor

- TOTAL

Other

Among those visitors staying in a hotel, motel, or RV park, more than seven in ten (72%) booked their accommodations one month or less in advance. Visitors who lodged somewhere other than Downtown or the Strip were the most likely to have booked their accommodations less than a week in advance (21% vs. 11% for Downtown lodgers and 9% for Strip Corridor lodgers). Downtown (75%) and other non-Strip Corridor lodgers (71%) were more likely than Strip Corridor lodgers (58%) to have booked their accommodations between one week and one month in advance. Strip Corridor lodgers (32%) were more likely than Downtown (15%) and other lodgers (9%) to have booked their accommodations more than one month in advance.

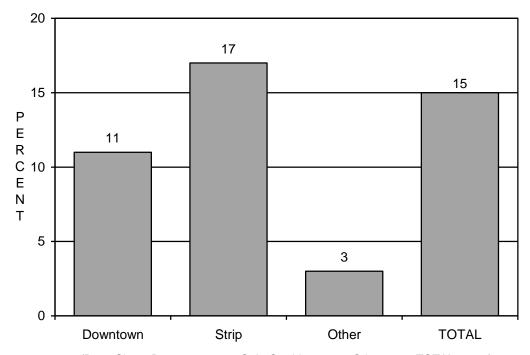
FIGURE 36
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Downtown=183, Strip Corridor=2657, Other=515, TOTAL=3356)

Looking at the type of room rates received by hotel/motel lodgers, Downtown (31%) and Strip Corridor lodgers (28%) were more likely to have paid a regular rate than other lodgers (21%). Downtown lodgers (34%) were more likely to receive a casino complimentary rate than Strip Corridor (14%) and other lodgers (13%). Strip Corridor lodgers (16%) and Downtown lodgers (10%) were more likely to have paid a package rate than those lodging elsewhere (3%). Strip Corridor lodgers (7%) were more likely to have paid a convention rate than Downtown (less than 1%) and other lodgers (1%). Visitors who lodged somewhere other than Downtown or the Strip Corridor were the most likely to pay some other special room rate (55%), while Strip Corridor lodgers (28%) were more likely than Downtown lodgers (15%) to have paid a special rate.

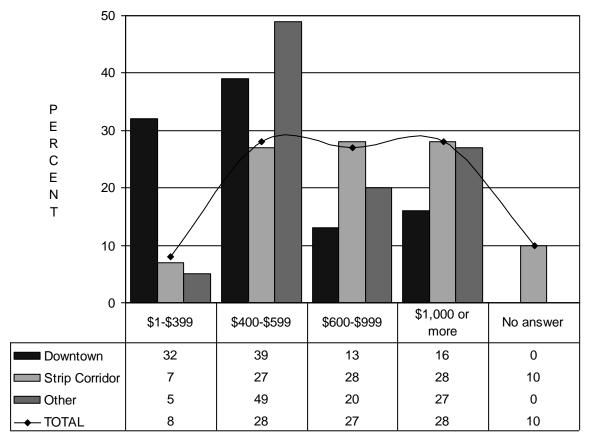
FIGURE 37
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Downtown=183, Strip Corridor=2657, Other=515, TOTAL=3356)

Both Strip Corridor (17%) and Downtown lodgers (11%) were more likely than visitors lodging elsewhere (3%) to be visiting Las Vegas as part of a tour group or package deal.

FIGURE 38
Cost Of Package Per Person
(Among Those Who Bought A Package)



(Base Sizes: Downtown=20*, Strip Corridor=459, Other=15*, TOTAL=494) (Mean: Downtown=\$565.69, Strip Corridor=\$873.47, Other=\$808.50, TOTAL=\$857.43)

We asked those visitors who purchased either a hotel or a tour/travel group package how much their package cost per person. On average, Strip Corridor lodgers (\$873.47) paid the most for their package, followed by other non-Downtown lodgers (\$808.50), while Downtown lodgers (\$565.69) paid the least.

^{*} Note the very small base sizes for Downtown and Other lodgers.

Other

← TOTAL

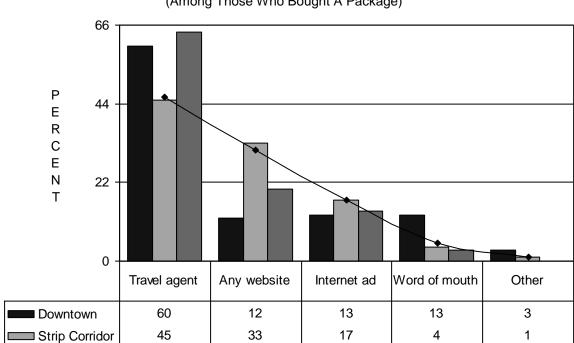


FIGURE 39
Where First Heard About The Package
(Among Those Who Bought A Package)

(Base Sizes: Downtown=20*, Strip Corridor=459, Other=15*, TOTAL=494)

14

17

3

5

0

1

20

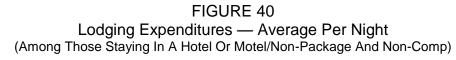
31

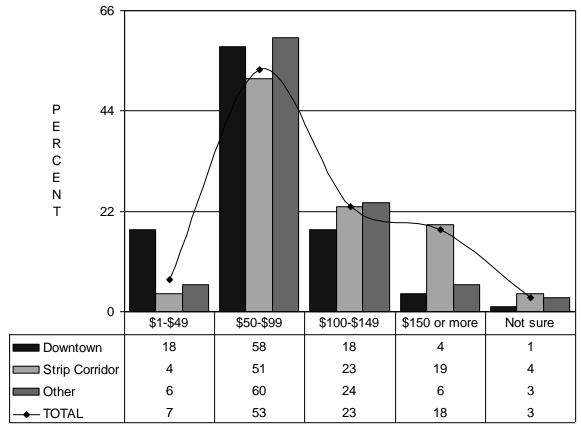
Package purchasers were asked where they first heard about the package they bought. Forty-six percent (46%) said they first heard about their package from a travel agent, 31% said it was through a website and 17% mentioned an Internet advertisement. Nearly one-half (45%) of Strip Corridor lodgers, six in ten (60%) Downtown lodgers and more than six in ten (64%) other lodgers said they heard about the package from a travel agent. Strip Corridor lodgers (33%) were the most likely to say they heard about it through an Internet ad.

64

46

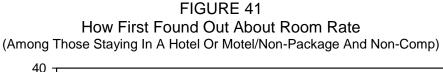
^{*} Note the very small base sizes for Downtown and Other lodgers.

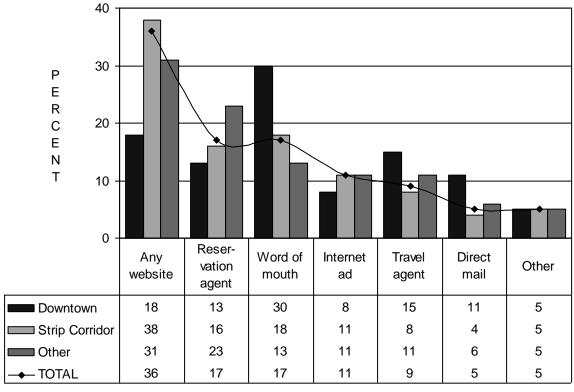




(Base Sizes: Downtown=101, Strip Corridor=1816, Other=434, TOTAL=2351) (Means: Downtown=\$78.62, Strip Corridor=\$106.94, Other=\$90.45, TOTAL=\$102.64)

Looking at lodging expenditures among visitors whose room was *not* part of a travel package and who were not comped for their stay, on average, Strip Corridor lodgers (\$106.94) paid more for their room than Downtown lodgers (\$78.62) and those who lodged elsewhere (\$90.45).

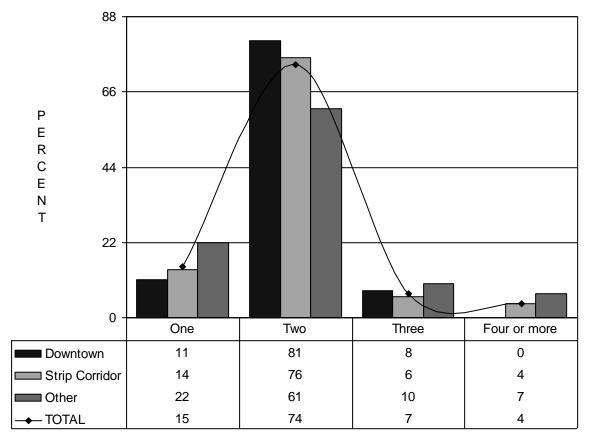




(Base Sizes: Downtown=101, Strip Corridor=1816, Other=434, TOTAL=2351)

Visitors were asked how they first found out about the room rate they paid. Strip Corridor lodgers (38%) were more likely than other non-Downtown lodgers (31%) to say they first found their room rate on a website, while Downtown lodgers (18%) were the least likely. Downtown lodgers (30%) were more likely than Strip Corridor lodgers (18%) to say they heard about their rate through word of mouth, while other lodgers (13%) were the least likely. Visitors who lodged somewhere other than Downtown or the Strip Corridor (23%) were more likely to say they first found their room rate through a reservation agent or call center than Strip Corridor (16%) and Downtown (13%) lodgers.

FIGURE 42
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Downtown=183, Strip Corridor=2716, Other=540, TOTAL=3439) (Means: Downtown=2.0, Strip Corridor=2.0, Other=2.0, TOTAL=2.0)

The majority (74%) of visitors who stayed in a hotel or motel room said two people stayed in their room, with an overall average of 2.0 room occupants. Downtown (81%) and Strip Corridor lodgers (76%) were more likely than those who lodged elsewhere (61%) to say they had two room occupants. Those who lodged somewhere other than Downtown or the Strip Corridor were the most likely to have either lodged alone (22% vs. 14% of Strip Corridor lodgers and 11% of Downtown lodgers) or to say they had three or more room occupants (17% vs. 10% of Strip Corridor lodgers and 8% of Downtown lodgers).

FIGURE 43
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Including Visitors Who Spent Nothing In That Category)

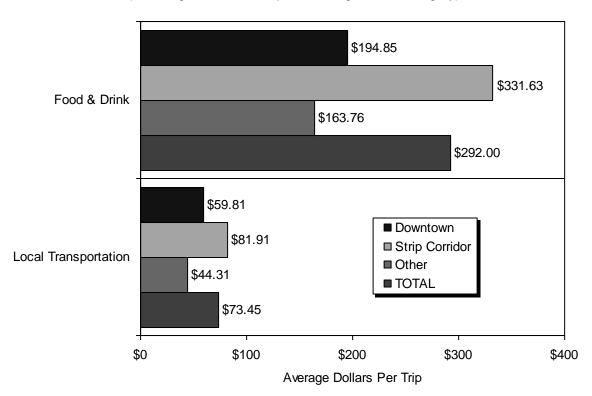
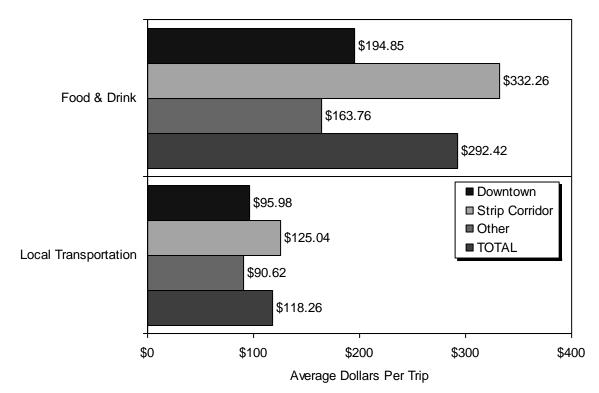


Figure 43 shows the average trip expenditures on food and drink and on local transportation *including visitors who said they spent nothing* in these categories. On average, Strip Corridor lodgers (\$331.63) spent more on food and drink than Downtown lodgers (\$194.85), while other lodgers (\$163.76) spent the least.

Strip Corridor lodgers (\$81.91) spent more on local transportation than Downtown (\$59.81) and other lodgers (\$44.31).

FIGURE 44
Average Trip Expenditures On Food & Drink —
And On Local Transportation
(Among Those Who Spent Money In That Category)



(Base Sizes, Food & Drink: Downtown=185, Strip Corridor=2711, Other=699, TOTAL=3596) (Base Sizes, Local Transportation: Downtown=115, Strip Corridor=1783, Other=342, TOTAL=2241)

Among those visitors who actually spent money, on average, Strip Corridor lodgers (\$332.26) spent more for food and drink than Downtown lodgers (\$194.85), who in turn spent significantly more than other lodgers (\$163.76).

Among those who spent money on local transportation, Strip Corridor lodgers (\$125.04) spent more than both Downtown (\$95.98) and other lodgers (\$90.62).

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FIGURE 45 Average Trip Expenditures On Shopping, Shows, And Sightseeing (Including Visitors Who Spent Nothing In That Category)

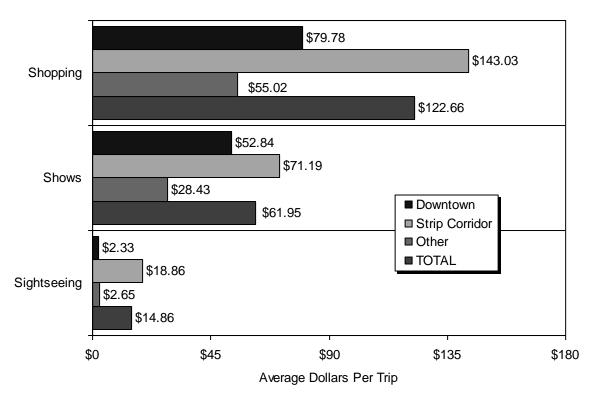
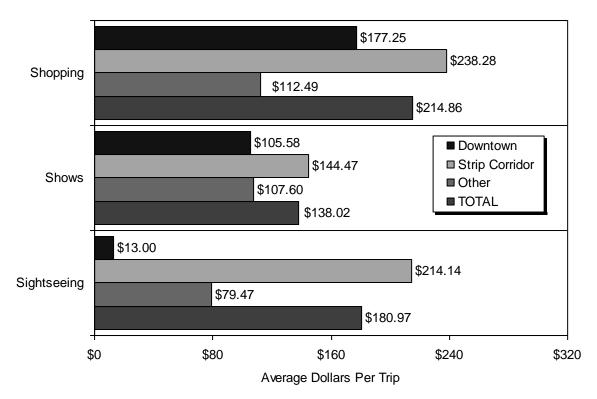


Figure 45 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, including visitors who said they spent nothing in these categories. Strip Corridor lodgers (\$143.03) spent more on shopping than Downtown lodgers (\$79.78), who in turn spent more than those who lodged elsewhere (\$55.02). Strip Corridor lodgers (\$71.19) also spent more on shows than Downtown lodgers (\$52.84), who in turn spent more than Other lodgers (\$28.43). Strip Corridor lodgers (\$18.86) spent more on sightseeing than both Downtown (\$2.33) and Other lodgers (\$2.65).

FIGURE 46
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Among Those Who Spent Money In That Category)



(Base Sizes, Shopping: Downtown=83, Strip Corridor=1632, Other=342, TOTAL=2057) (Base Sizes, Shows: Downtown=93, Strip Corridor=1339, Other=185, TOTAL=1617) (Base Sizes, Sightseeing: Downtown=33, Strip Corridor=239, Other=23, TOTAL=296)

Among visitors who spent money in these categories, on average Strip Corridor (\$238.28) and Downtown lodgers (\$177.25) spent more on shopping than other lodgers (\$112.49). Strip Corridor lodgers spent significantly more on shows (\$144.47) than both Downtown (\$105.58) and other lodgers (\$107.60). Strip Corridor lodgers (\$214.14) spent more on sightseeing than Downtown lodgers (\$13.00), with other lodgers in between (\$79.47).

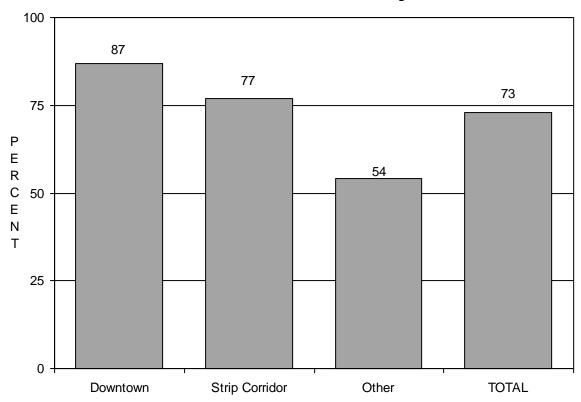
GAMING BEHAVIOR AND BUDGETS

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Las Vegas Visitor Profile

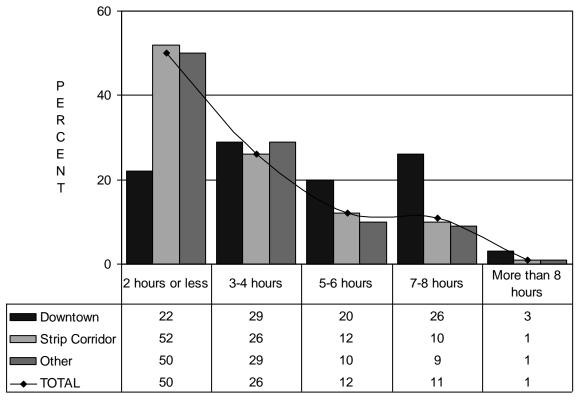
Seventy-three percent (73%) of visitors said they gambled on their most recent visit to Las Vegas. Downtown lodgers (87%) were more likely to have gambled than Strip Corridor lodgers (77%), and both were more likely to have gambled than those who lodged elsewhere (54%).

FIGURE 47 Whether Gambled While In Las Vegas



Only "yes" responses are reported in this figure.

FIGURE 48
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



(Base Sizes: Downtown=162, Strip Corridor=2091, Other=377, TOTAL=2630) (Means: Downtown=4.6, Strip Corridor=2.8, Other=2.9, TOTAL=2.9)

Among those visitors who said they gambled on their current trip to Las Vegas, Downtown lodgers averaged more hours per day gambling (4.6 hours) than both Strip Corridor (2.8 hours) and other lodgers (2.9 hours).

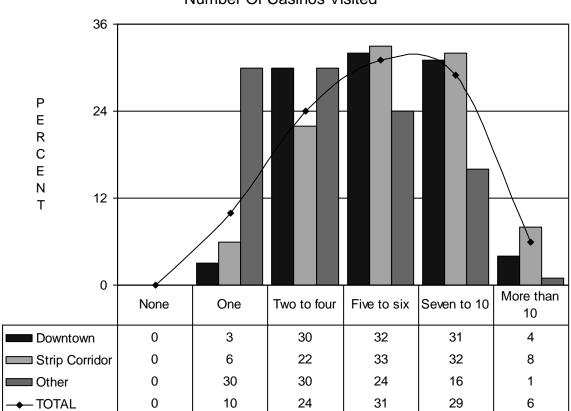


FIGURE 49 Number Of Casinos Visited

(Means: Downtown=5.9, Strip Corridor=6.2, Other=3.8, TOTAL=5.7)

All visitors were asked how many casinos they had visited on their current trip to Las Vegas. Downtown lodgers (5.9) and Strip Corridor lodgers (6.2) visited more casinos than those who lodged elsewhere (3.8).

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

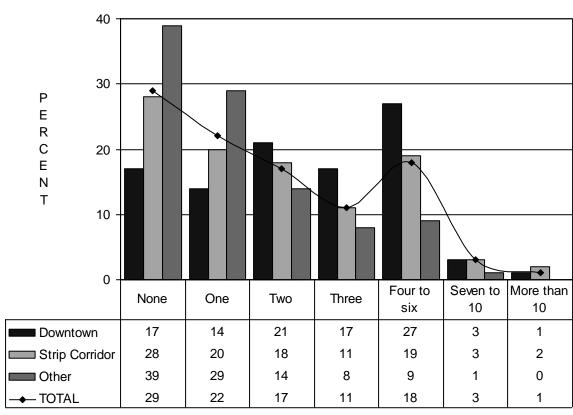


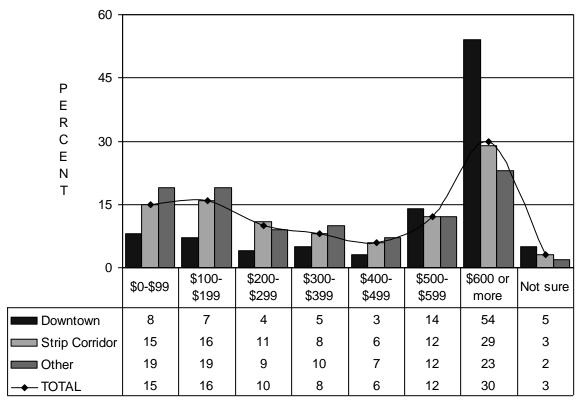
FIGURE 50 Number Of Casinos Where Gambled⁻

(Means: Downtown=2.7, Strip Corridor=2.2, Other=1.3, TOTAL=2.1)

All visitors were asked in how many casinos they had gambled on their current trip to Las Vegas. Downtown lodgers (2.7) gambled in more casinos than Strip Corridor lodgers (2.2), while other lodgers (1.3) gambled in fewer casinos.

^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

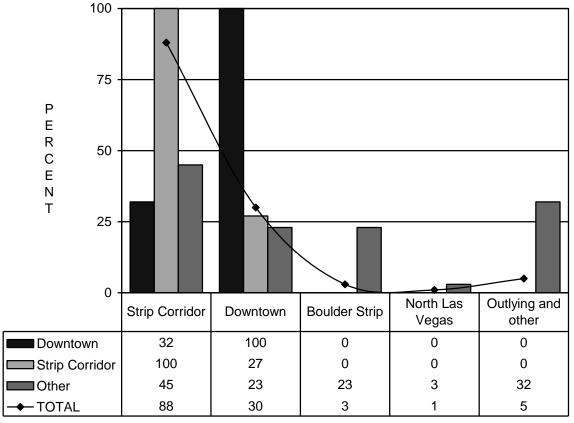
FIGURE 51
Trip Gambling Budget
(Among Those Who Gambled)



(Base Sizes: Downtown=162, Strip Corridor=2091, Other=377, TOTAL=2630) (Means: Downtown=\$725.48, Strip Corridor=\$600.88, Other=\$395.31 TOTAL=\$578.54)

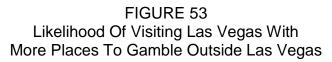
The average gambling budget among those who gambled was \$578.54. Downtown lodgers (\$725.48) budgeted the most for gambling, followed by Strip Corridor lodgers (\$600.88), while those who lodged elsewhere (\$395.31) budgeted the least.

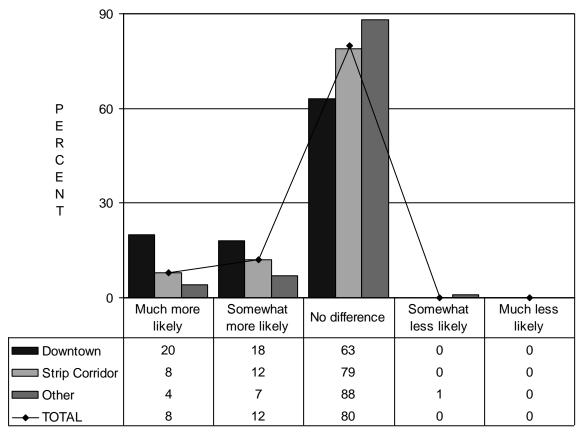
FIGURE 52 Where Visitors Gambled (Among Those Who Gambled)



(Base Sizes: Downtown=162, Strip Corridor=2091, Other=377, TOTAL=2630)

As would be expected, nearly all Downtown lodgers who gambled said they did so Downtown (99.8%) and nearly all Strip Corridor lodgers who gambled said they did so in the Strip Corridor (99.6%). Visitors who stayed in other areas were more likely to have gambled on the Boulder Strip (23%), North Las Vegas (3%) or other areas (32%).



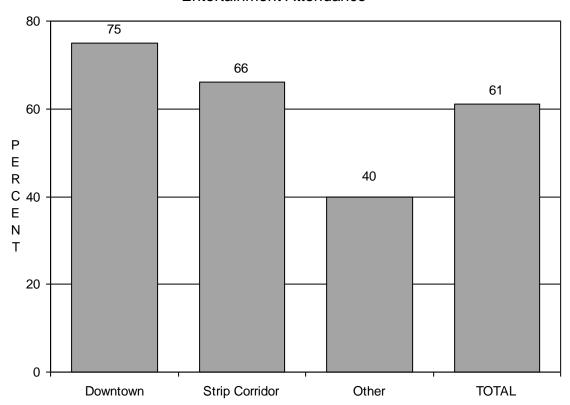


All visitors to Las Vegas were asked whether they feel they are more or less likely to visit because there are more places to gamble outside of Las Vegas. Downtown lodgers (38%) were more likely than Strip Corridor lodgers (20%), who in turn were more likely than other lodgers (11%), to say that outside gaming venues made them more likely to visit Las Vegas. Those who lodged elsewhere than Downtown or the Strip Corridor (88%) were the most likely to say outside gaming venues made no difference in their decision to visit Las Vegas, while Strip Corridor lodgers (79%) were more likely than Downtown lodgers (63%) to give this response.

ENTERTAINMENT

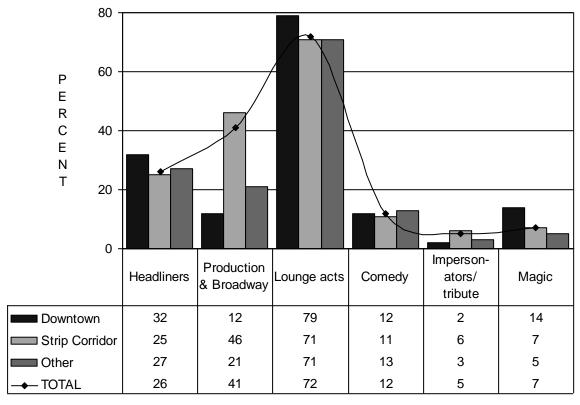
About six in ten visitors (61%) attended shows during their most recent stay in Las Vegas. Downtown lodgers (75%) were more likely to have attended a show than Strip Corridor lodgers (66%), who in turn were more likely than those who lodged elsewhere (40%).

FIGURE 54 Entertainment Attendance



Only "yes" responses are reported in this figure.



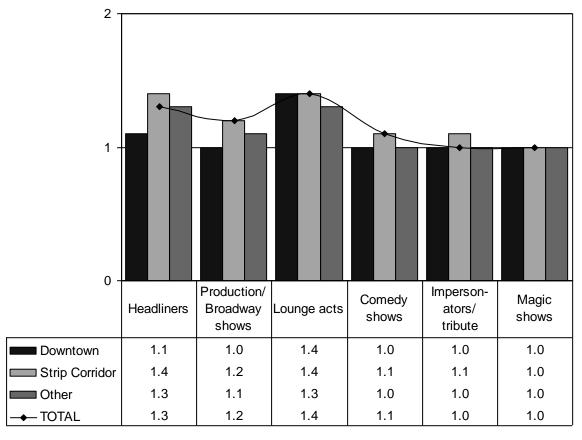


*Multiple responses permitted.

(Base Sizes: Downtown=139, Strip Corridor=1780, Other=276, TOTAL=2195)

Among those visitors who saw a show while on their most recent trip to Las Vegas, more than seven in ten (72%) went to a lounge act. Strip Corridor lodgers (46%) were more likely than Downtown (12%) and other lodgers (21%) to have seen a Broadway or production show. Strip Corridor lodgers (6%) were also the most likely to have seen an impersonator or tribute show (compared to 2% of Downtown lodgers and 3% of other lodgers). Downtown lodgers (14%) were more likely to have seen a magic show than Strip Corridor (7%) and other lodgers (5%).





*Multiple responses permitted. (Base Sizes: Downtown=139, Strip Corridor=1780, Other=276, TOTAL=2195)

We looked at the average number of times visitors attended each type of show among those who attended shows. Overall, visitors saw an average of 1.4 lounge acts, 1.3 headliner shows, 1.2 Broadway/production shows, 1.1 comedy shows, 1.0 impersonator/tribute shows and 1.0 magic shows. There were no statistically differences among the subgroups.

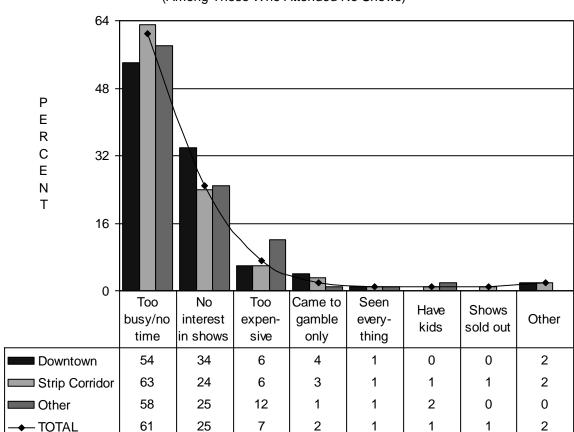


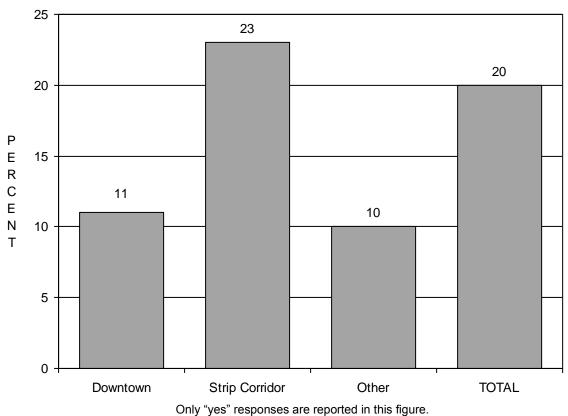
FIGURE 57
Main Reason For Not Attending Any Shows (Among Those Who Attended No Shows)

(Base Sizes: Downtown=69, Strip Corridor=850, Other=331, TOTAL=1250)

Visitors who did not attend any shows while on their current trip to Las Vegas were asked why. The majority (61%) said it was because they were too busy to see a show, while one in four (25%) said they had no interest in attending shows. Visitors who lodged somewhere other than Downtown or the Strip (12%) were more likely than Downtown or Strip Corridor lodgers (6% each) to say they thought shows were too expensive.

These results are from 2014. This question is asked every other year and was not asked in 2015.

FIGURE 58
Whether Have Been To Other Paid Attractions



We asked visitors if, during their current trip to Las Vegas, they had been to other Las Vegas attractions for which they had to pay, such as theme parks or water parks. Strip Corridor lodgers (23%) were more likely to have done so than Downtown (11%) and other lodgers (10%).

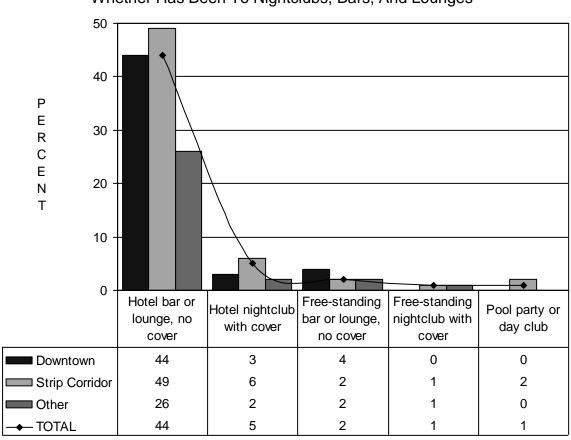
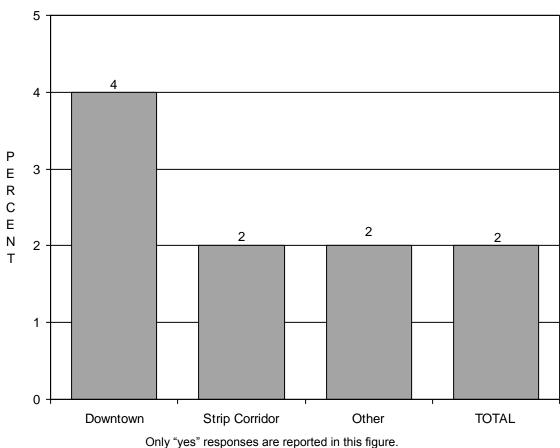


FIGURE 59
Whether Has Been To Nightclubs, Bars, And Lounges

Only "yes" responses are reported in this figure.

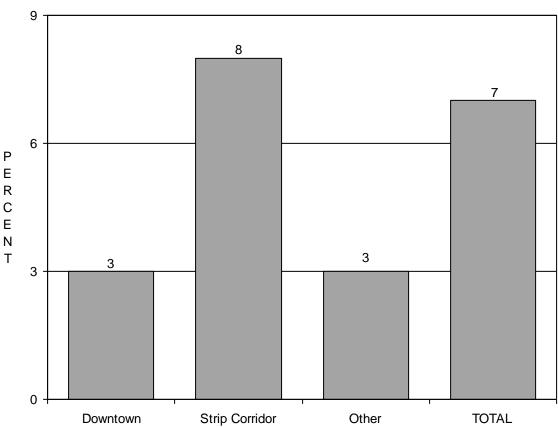
Strip Corridor (49%) and Downtown lodgers (44%) were more likely than those lodging elsewhere (26%) to have been to a hotel bar or lounge without a cover charge. Strip Corridor lodgers (6%) were also more likely than other non-Downtown lodgers (2%) to say they had been to a hotel nightclub that charged a cover fee.





When asked if they had played golf during their current visit to Las Vegas, 2% of all visitors said they had done so. There were no major differences between the subgroups on this measure.





Only "yes" responses are reported in this figure.

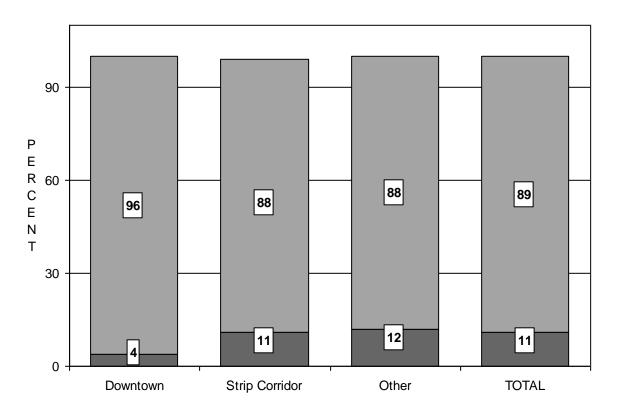
When asked if they had visited a spa during their current visit to Las Vegas, 7% of all visitors said they had. Strip Corridor lodgers (8%) were more likely to have visited a spa than Downtown or other lodgers (3% each).

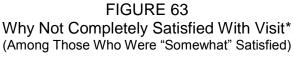
^{*} These results are from 2014. This question is asked every other year and was not asked in 2015.

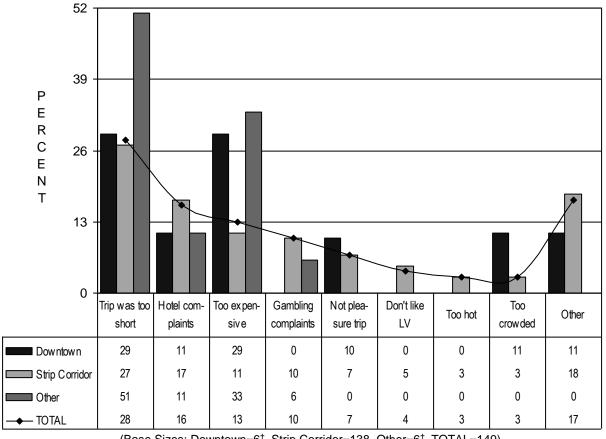
ATTITUDINAL INFORMATION

Eighty- nine percent (89%) of visitors said they were "very satisfied" with their latest visit to Las Vegas. Downtown lodgers (96%) were more likely than Strip Corridor and other lodgers (88% each) to say they were very satisfied.

FIGURE 62 Satisfaction With Visit







(Base Sizes: Downtown=6[†], Strip Corridor=138, Other=6[†], TOTAL=149)

Visitors who were not completely satisfied with their visit were asked why. Among the most common reasons given were that the trip was too short (28%) and hotel complaints (16%). There were no noteworthy differences between the subgroups on this measure.

These results are from 2014. This question is asked every other year and was not asked in 2015.

Note the extremely small base sizes for Downtown and Other lodgers.

◆ TOTAL

6

3

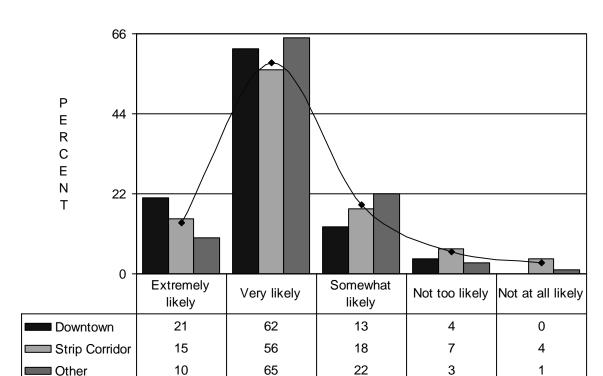


FIGURE 64
Likelihood Of Returning To Las Vegas For A Vacation Trip In The Future

Visitors were asked how likely they are to return to Las Vegas in the future for a vacation or pleasure trip, and 72% of all visitors said they were "extremely" or "very" likely to return. Downtown lodgers (83%) were more likely than Strip Corridor (71%) and other lodgers (75%) to say they were "extremely" or "very" likely to return. Visitors who lodged somewhere other than Downtown or the Strip Corridor (22%) were more likely than Strip Corridor (18%) and Downtown (13%) lodgers to say they were "somewhat" likely to return. Strip Corridor lodgers (11%) were more likely than Downtown and other lodgers (4% each) to say they were "not too" or "not at all" likely to return.

19

58

14

Page 70

Las Vegas Visitor Profile

0

Downtown

Other

◆ TOTAL

Strip Corridor

Extremely

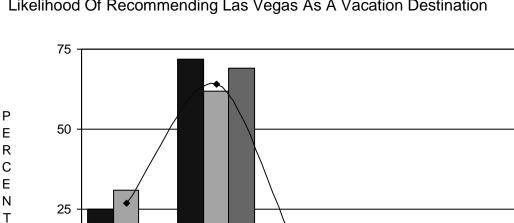
likely

25

31

12

27



Somewhat

likely

4

7

17

9

Not too likely

0

0

2

1

Not at all likely

0

0

0 0

FIGURE 65 Likelihood Of Recommending Las Vegas As A Vacation Destination

Visitors were also asked how likely they are to recommend Las Vegas to others as a vacation destination, and most (91%) said they were "extremely" or "very" likely to recommend Las Vegas. Strip Corridor (31%) and Downtown (25%) lodgers were much more likely than other lodgers (12%) to say they were "extremely" likely to recommend Las Vegas, while those who lodged elsewhere than Downtown or the Strip Corridor were the most likely to say they were "somewhat" likely to recommend Las Vegas (17% vs. 7% for Strip Corridor lodgers and 4% for Downtown lodgers).

Very likely

72

62

69

64

VISITOR DEMOGRAPHICS

With regards to visitor demographics, Downtown lodgers were more likely than Strip Corridor lodgers to be:

- Older (mean age of 50.7 years).
- Retired (34% vs. 23% of Strip Corridor lodgers).
- With some college education (36% vs. 23% of Strip Corridor lodgers).
- From the United States (96% vs. 81% of Strip Corridor lodgers).
- From the West (71% vs. 46% of Strip Corridor lodgers), particularly Southern California (42% vs. 22%).

Strip Corridor lodgers were more likely than Downtown lodgers to be:

- Employed (68% vs. 55% of Downtown lodgers).
- From a foreign country (19% vs. 4% of Downtown lodgers).
- From Northern California (4% vs. 1% of Downtown lodgers).

FIGURE 66
VISITOR DEMOGRAPHICS

	Downtown	Strip Corridor	Other	TOTAL
GENDER Male Female	51% 49	50% 50	52% 48	51% 49
MARITAL STATUS Married Single Separated/Divorced Widowed	81 13 2 3	79 13 6 2	77 15 6 2	79 14 6 2
EMPLOYMENT Employed Unemployed Student Retired Homemaker	55 1 5 34 5	68 1 2 23 6	64 2 5 25 4	67 1 3 24 5
EDUCATION High school or less Some college College graduate Trade/vocational school	9 36 55 0	14 25 58 4	15 26 50 9	14 25 56 5
AGE 21 to 29 30 to 39 40 to 49 50 to 59 60 to 64 65 or older MEAN	8 23 20 11 6 32 50.7	11 22 23 16 10 18 47.7	16 22 24 9 8 21 46.6	12 22 23 15 9 19
BASE	(185)	(2716)	(699)	(3601)

FIGURE 67
VISITOR DEMOGRAPHICS

	Downtown	Strip Corridor	Other	TOTAL
ETHNICITY				
White	86%	86%	79%	85%
African American/Black	4	3	6	4
Asian/Asian American	5	4	3	4
Hispanic/Latino	6	6	12	7
Other	0	1	0	1
HOUSEHOLD INCOME				
Less than \$20,000	4	1	3	2
\$20,000 to \$39,999	4	3	6	4
\$40,000 to \$59,999	26	18	23	19
\$60,000 to \$79,999	12	24	18	23
\$80,000 or more	48	43	44	43
No Answer	7	12	5	10
VISITOR ORIGIN				
U.S.A.	96	81	92	84
Eastern states*	<u>96</u> 5	<u>s.</u> 8	<u>5 </u>	<u>84</u> 7
Southern states†	10	<u>81</u> 8 15	8	13
Midwestern states‡	11	12	92 5 8 7	11
Western states§		46		
California	71 42 41	<u>46</u> <u>26</u> 22	73 39 33	<u>53</u> <u>29</u> 25
Southern California	41	22	33	25
Northern California	1	4	6	4
Arizona	12	8	13	9
Other West	17	13	21	15
<u>Foreign</u>	<u>4</u>	<u>19</u>	<u>8</u>	<u>16</u>
BASE	(185)	(2716)	(699)	(3601)

^{* &}lt;u>Eastern states</u>: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

^{† &}lt;u>Southern states</u>: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

Midwestern states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

[§] Western states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada (excluding Clark County), New Mexico, Oregon, Utah, Washington, and Wyoming.